WebSPOE Old-New Reference Tool: **(Parentheses = location of information in common docs)**

○ **CHILD**
- Child Detail
  - Child demographics **(Combined Enrollment Form)**
  - Initial Parental Consent for Eval/Assess **(Notice of Action/ Consent for Initial Eval/Assess)**
  - Important dates **(DOB, Referral Date, Elig Date - Eligibility Determination Doc) (Initial IFSP date – Initial IFSP)**
  - Service Coordination List **(Intake – Referral Form, Ongoing – Page 2 of Initial IFSP)**
- Enrollment
  - General enrollment information **(Referral Form, Change of Information/Inactivation Form)**
- Family Members
  - Family member and child detail **(Page 2 of Combined Enrollment Form)**
  - Head of Household & other family member *(***Page 2 of Combined Enrollment Form)**
- Health Plans
  - Insurance, Medicaid, MC+ **(Page 3 of Combined Enrollment Form)**
- Social History
  - Social history topic / Health tab **(Social History, Medical Records, Health Summary)**

○ **HEALTH**
- Current Health
  - Concerns/Illnesses, Hospitalization/Surgeries **(Medical records, Health Summary, Eligibility Determination Doc, Social History)**
- Medication/Equipment/Supply **(Page 3 of Social History, Medical records)**

- Immunizations **(Medical records, Health Summary)**

- Physician **(Page 2 of Social History, Page 2 of IFSP, Bottom of Health Summary)**

- Neonatal Information regarding birth **(Pages 6-8 of Social History, Medical records)**

- Diagnosis **(Medical records, Eligibility Determination Doc, Health Summary)**

○ **DOMAINS**
- Domains
  - Domain Eval/Assess info **(Current evaluation / assessment reports)**
  - Domain Summary Report **(Pages 4 & 5 of Social History)**
- Development
  - Developmental Milestones **(Pages 4 & 5 of Social History, Evaluation/Assessment reports, Screenings, Page 3 of IFSP)**

○ **ELIGIBILITY**
- Eligibility Determination **(Eligibility Determination Doc)**

- Eligibility Source **(Eligibility Determination Doc)**

- Eligibility Authorizations **(Authorization for Team meeting / Evaluation-Assessment form)**

- Eligibility Notes **(Case notes, Health Summary)**

❖ TEAM MEETINGS

- Meeting History
  - All tentative, scheduled, ongoing and finalized meetings **(Meeting Notification, Case notes, Pages 1 & 6 of IFSP)**

- Meeting Planner
  - Info for IFSP meetings **(Case notes, Meeting Notification, IFSP planning worksheet)**
  - Schedule/reschedule a meeting **(Case notes, Meeting notification)**
  - Team Meeting Members **(Page 11 of IFSP, Case notes)**

- Meeting Activities
  - Attendance **(Page 11 of IFSP, Case notes)**
  - IFSP Specifications **(Pages 1 & 6 of IFSP)**
  - Review Family Assessment **(Page 4 of IFSP)**
  - Team Summary of Present Level **(Page 3 of IFSP)**
  - New Outcome or Review Existing Outcomes **(Page 5 of IFSP, duplicated as needed)**
  - Parental Consent for IFSP Services **(Notice of Action/Consent for EI Services)**
  - IFSP Authorizations or Other Services **(Pages 6, 7, & 9 of IFSP)**
  - Meeting Notes **(Case notes)**
  - Transition Information **(Page 10 of IFSP)**
  - Team Communications **(bottom of Page 11 of IFSP)**
  - Next Meeting **(bottom of Page 11 of IFSP, case notes)**
  - Delivered Services Review **(Not in common docs)**
  - Finalize Meeting **(Not in common docs)**

- Team Members **(Page 11 of IFSP, Case notes, Meeting notification)**

❖ IFSP

- Present Level **(Page 3 of IFSP)**

- Family Assessment **(Page 4 of IFSP)**

- Outcomes **(Page 5 of IFSP, duplicated as needed)**

- Authorizations **(Pages 6 & 7 of IFSP)**

- Other Services **(Page 9 of IFSP)**

- Transition
  - Transition 'Into' and 'Within' Topic **(Top of Page 10 of IFSP)**
  - Transition 'From' Topic **(Bottom of Page 10 of IFSP)**

❖ NOTES

- Case Notes **(Case notes)**

- Provider Progress Notes **(Provider Monthly Progress notes)**

- Compliance Notes
  - View/Add note for reason for exceeding 45-day timelines **(Case notes)**
  - View/Add Access Log notes **(Access Log)**
- E-Access
  - Links to E-Access Summary and Detail Reports **(Not in common docs)**